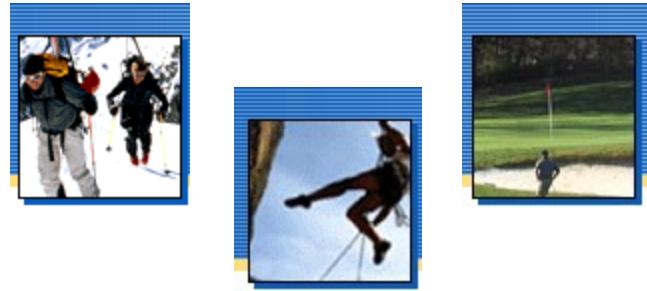


U.S. Army 2005 MWR Leisure Needs Survey



**AST Livorno
Italy**

CALIBER
an ICF Consulting Company

BRIEFING OUTLINE

AST Livorno

□ **LEISURE NEEDS SURVEY**

- Project Overview
- Methodology
- Patron Sample
- Products

□ **SURVEY RESULTS**

- MWR Programs and Facilities
- Army Community Service
- Child and Youth Services
- Better Opportunities for Single Soldiers
- Leisure Activities
- Deployment and MWR
- Career Intentions

□ **NEXT STEPS**

PROJECT OVERVIEW

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MWR STRATEGIC BUSINESS PLANNING MODEL

COMPONENTS

Analyzing and forecasting the external environment

Analyzing programs and markets

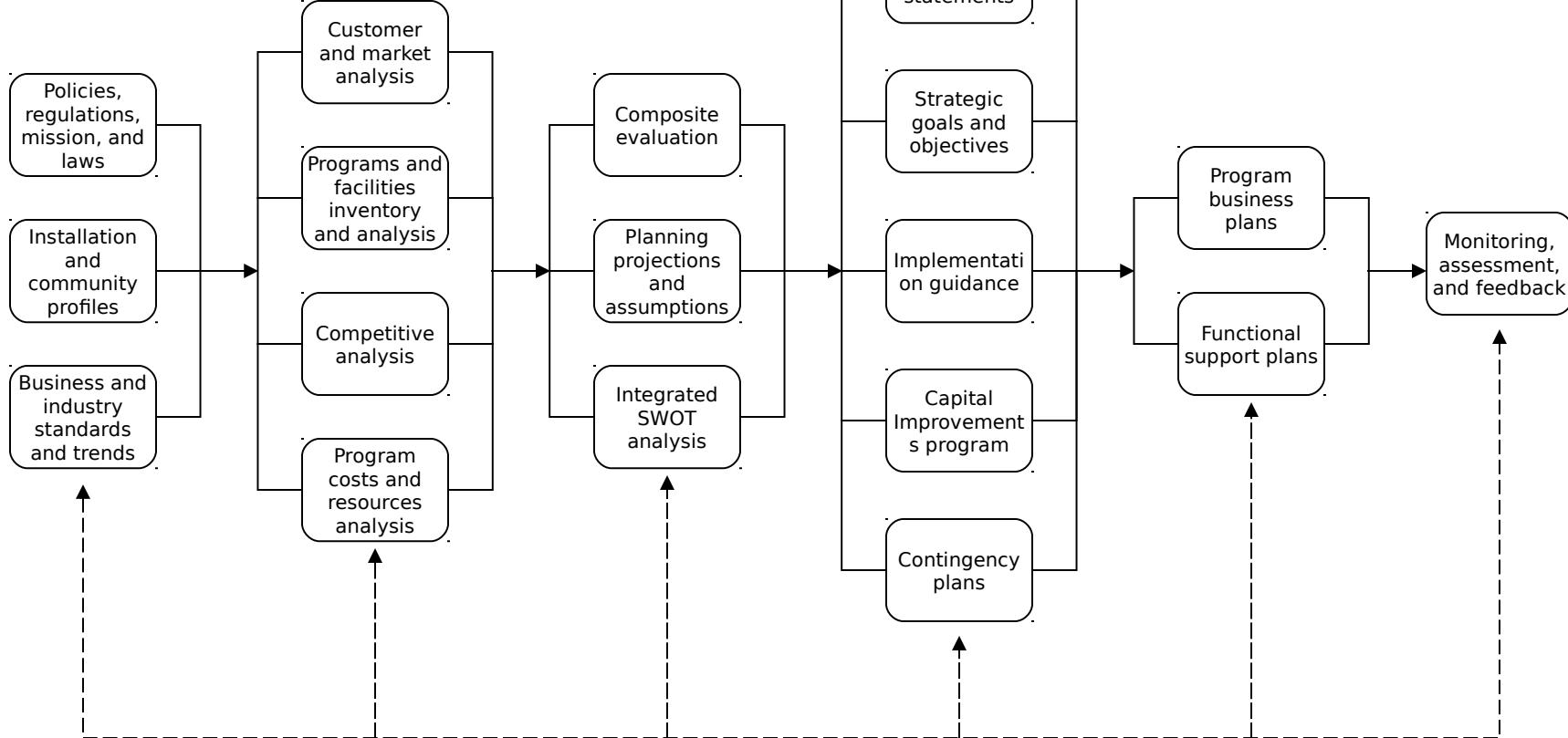
Developing alternatives

Formulating the strategic business plan

Formulating operational business plans

Monitoring and evaluating plan implementation

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METHODOLOGY

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PROJECT SCOPE

- 92 sites were surveyed in 2005
 - Northeast (21 sites)
 - Northwest (10 sites)
 - Southeast (13 sites)
 - Southwest (14 sites)
 - Europe (20 sites)
 - Korea (9 sites)
 - Pacific (5 sites)
- 249,555 surveys were distributed throughout the Army to four patron groups:
 - Active Duty Soldiers
 - Spouses of Active Duty Soldiers (CONUS only)
 - DA Civilians
 - Retirees (CONUS only)
- 425 surveys were distributed at AST Livorno



SURVEY ADMINISTRATION

- Designed to collect information on installation MWR programs and facilities as well as the leisure activities of your potential market
- 65 multiple choice questions; 7 questions were tailored to your specific installation issues

METHODOLOGY

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□ **SURVEY ADMINISTRATION (Continued)**

- Active Duty and DA Civilian surveys distributed by installation POCs
- Spouses of Active Duty and Retiree surveys direct mailed to home addresses (CONUS only)
- Web survey option offered for the first time to all respondents

METHODOLOGY

AST Livorno

I SURVEY SAMPLE

- Four population segments
 - Active Duty
 - Spouses of Active Duty (CONUS only)
 - Civilian Employees
 - Retirees (CONUS only)
- Response Rates and Confidence Intervals for each patron group and overall sample

	<u>Survey Population</u>	<u>Surveys Distributed</u>	<u>Surveys Returned</u>	<u>Response Rate</u> *	<u>Confidence Interval</u> **
Army:					
Survey Totals	1,212,240	249,555	50,651	20.91%	±.43%
AST Livorno:					
Active Duty	323	275	48	17.45%	±13.05%
Spouses of Active Duty	N/A	N/A	N/A	N/A	N/A
Civilian Employees	209	150	26	17.33%	±17.98%
Retirees	N/A	N/A	N/A	N/A	N/A
Total	532	425	74	17.41%	±10.57%

* Response rate is calculated by dividing the number of surveys returned by the number of surveys distributed. It should be noted that low response rates (i.e., less than 20%) increase the chance that one or more subgroups (e.g., for active duty patron group, E1-E4 is a subgroup) may be over- or under-represented. Any patron groups with fewer than 15 survey respondents do not have their data reported to protect privacy and ensure representativeness.

**A confidence interval for a sample mean tells us the range in which we are likely to find the true population mean: Assume 300 surveys were returned for an active duty patron group of 1,350. 52% responded that they used the gym in the last year. The 95% confidence interval for this case would be ±5%. Thus there is a 95% chance that the TOTAL number of active duty at this installation who used the gym last year is between 47% and 57%. We can be 95% confident that between 634 and 770 active duty used the gym.

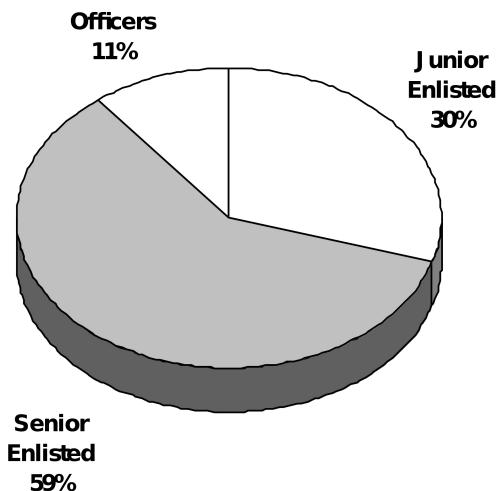
PATRON SAMPLE*

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RESPONDENT POPULATION SEGMENTS

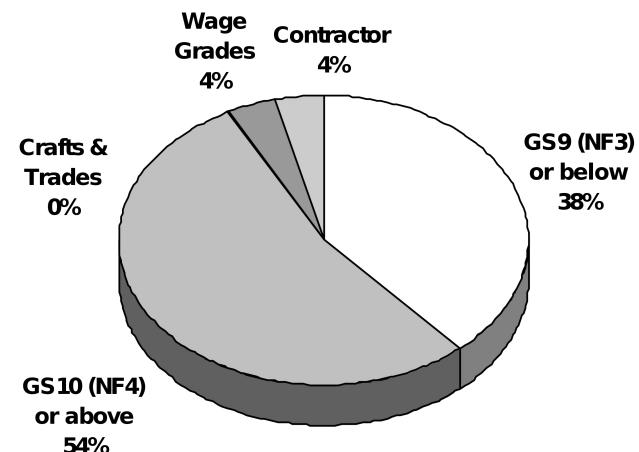
ACTIVE DUTY

(n = 47)



CIVILIANS

(n = 26)



* The n provided for each patron group is equal to the number of respondents who provided their rank or paygrade.

PRODUCTS

AST Livorno

■ **PRODUCTS**

- Comprehensive installation report of survey data in electronic form
- SPSS data file provided to installation representatives for further analyses, if desired
- Installation level briefing of findings
- IMA and Army level roll-up reports and briefings

■ **PRODUCT DISTRIBUTION**

- All products provided on CD
- CD distribution to installation MWR Directors, IMA Headquarters, and U.S. Army Community and Family Support Center

MWR PROGRAMS & FACILITIES: USAGE AT AST LIVORNO

AST Livorno

MOST FREQUENTLY USED FACILITIES

Fitness Center/Gymnasium	93%
Library	84%
Car Wash	69%
Automotive Skills	60%
Athletic Fields	57%

LEAST FREQUENTLY USED FACILITIES

BOSS	12%
Cabins & Campgrounds	13%
Youth Center	14%
Child Development Center	15%
School Age Services	17%

MWR PROGRAMS & FACILITIES: SATISFACTION AT AST LIVORNO*

AST Livorno

FACILITIES WITH HIGHEST SATISFACTION RATINGS*

Athletic Fields	4.38
Library	4.34
Youth Center	4.23
Fitness Center/Gymnasium	4.05
Automotive Skills	3.95

FACILITIES WITH LOWEST SATISFACTION RATINGS*

Bowling Food & Beverage	2.56
School Age Services	2.81
Bowling Center	2.94
Multipurpose Sports/Tennis Courts	3.19
Arts & Crafts Center	3.37

*Programs and facilities were rated on a 5 point scale: 5 = Very Satisfied and 1 = Very Dissatisfied

MWR PROGRAMS & FACILITIES: QUALITY AT AST LIVORNO*

AST Livorno

FACILITIES WITH HIGHEST QUALITY RATINGS*

Youth Center	4.53
Athletic Fields	4.22
Library	4.19
Fitness Center/Gymnasium	3.95
Car Wash	3.89

FACILITIES WITH LOWEST QUALITY RATINGS*

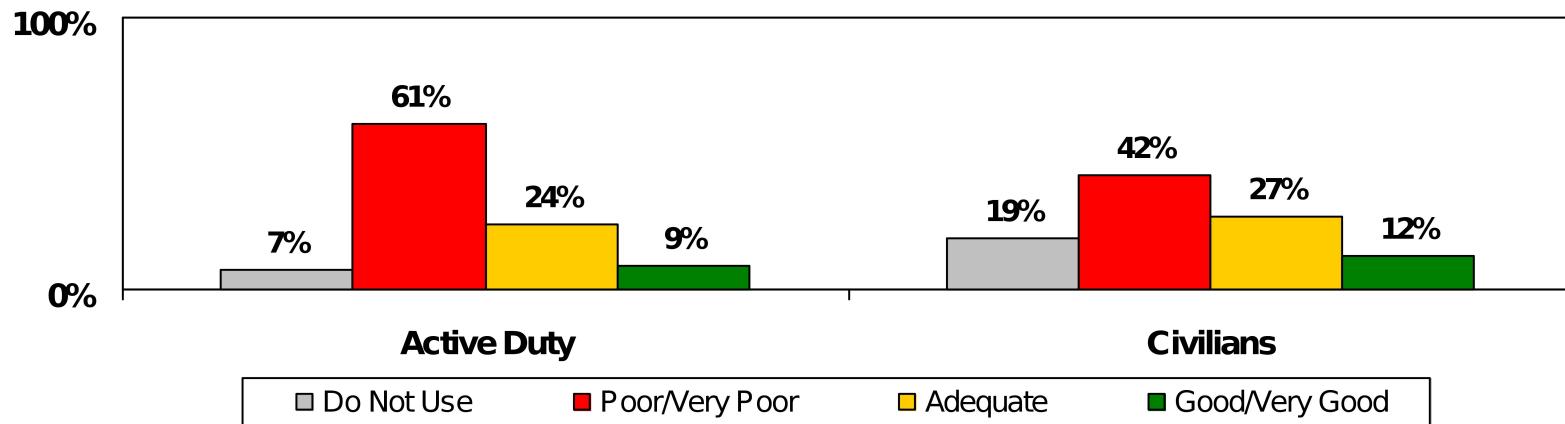
Bowling Food & Beverage	2.90
Multipurpose Sports/Tennis Courts	3.07
School Age Services	3.09
Bowling Center	3.12
BOSS	3.15

*Programs and facilities were rated on a 5 point scale: 5 = Very Good and 1 = Very Poor. These ratings are an average of three quality scores: Building/Facility/Space, Equipment/Furnishings, and Personnel.

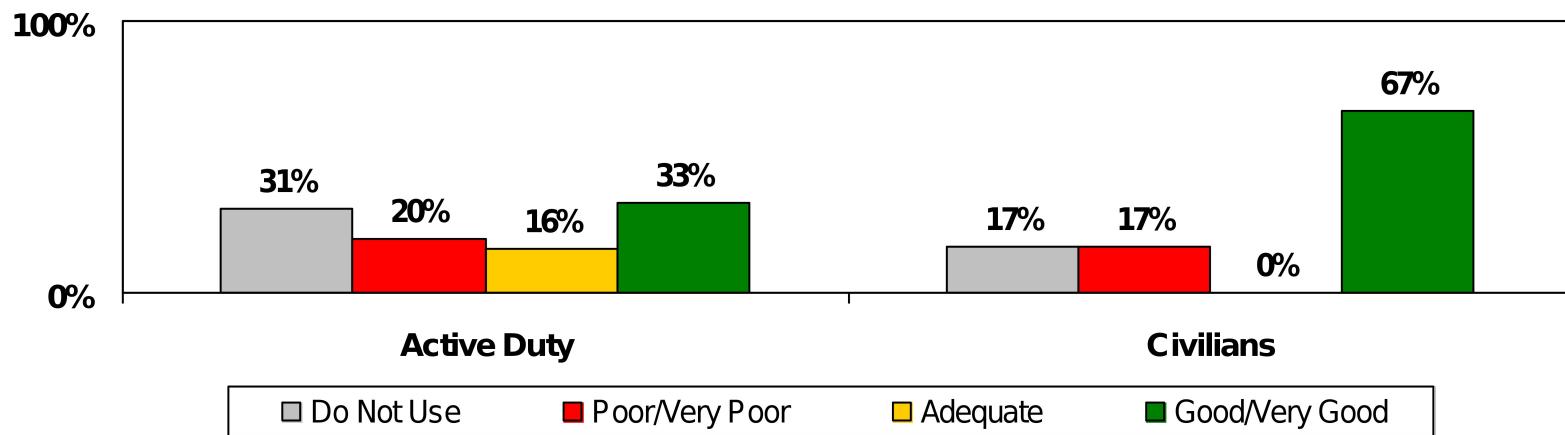
MWR PROGRAMS & FACILITIES: FOOD AND BEVERAGE SERVICES QUALITY

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Quality of On-Post Services



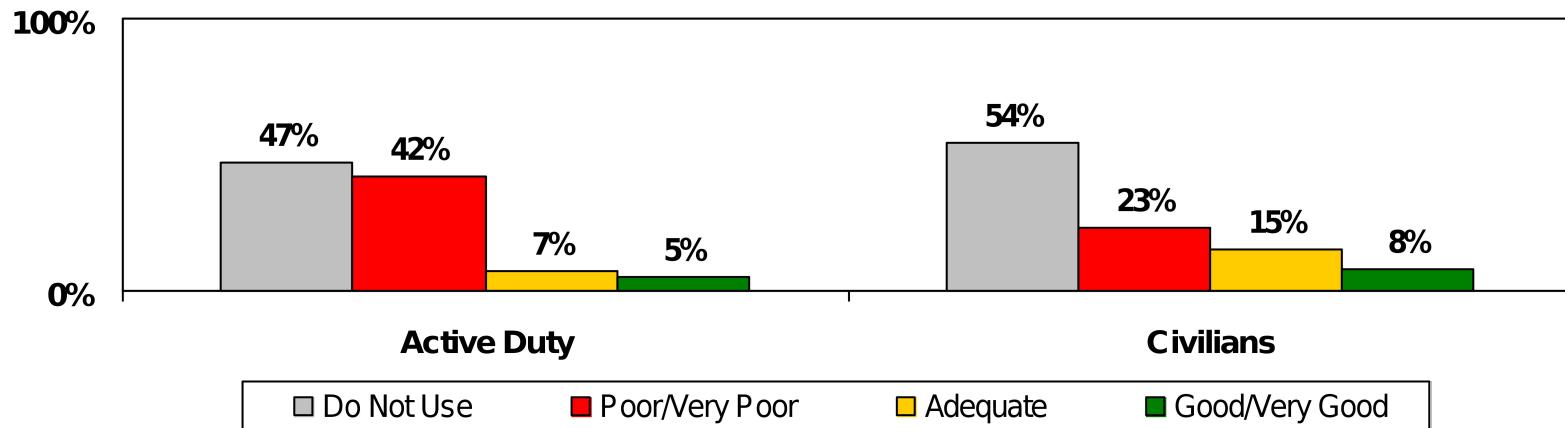
Quality of Off-Post Services



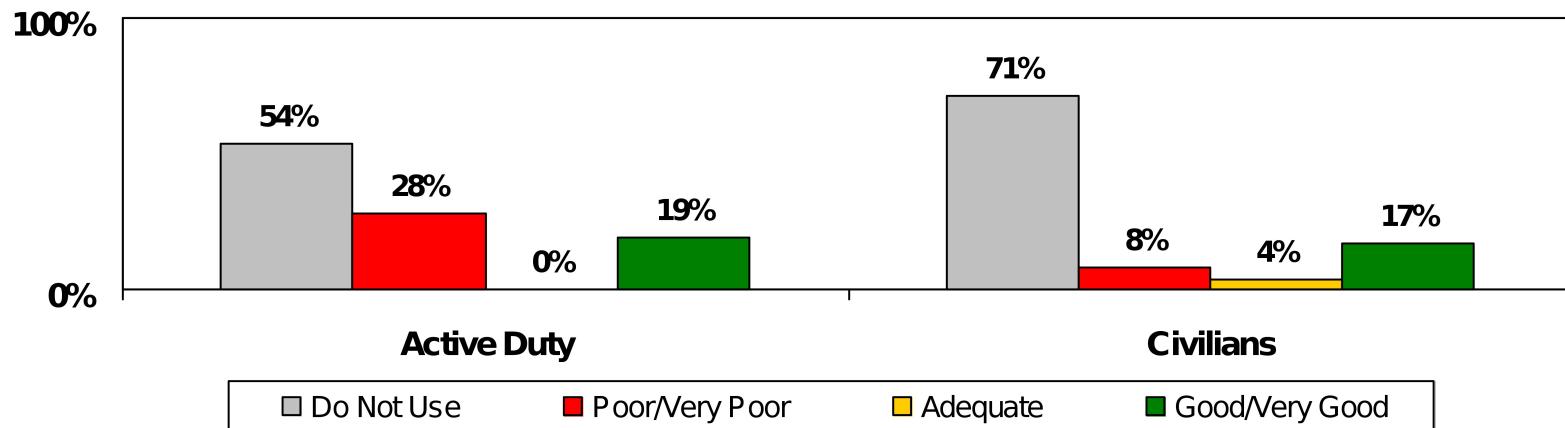
MWR PROGRAMS & FACILITIES: CATERING SERVICES QUALITY

AST Livorno

Quality of On-Post Services



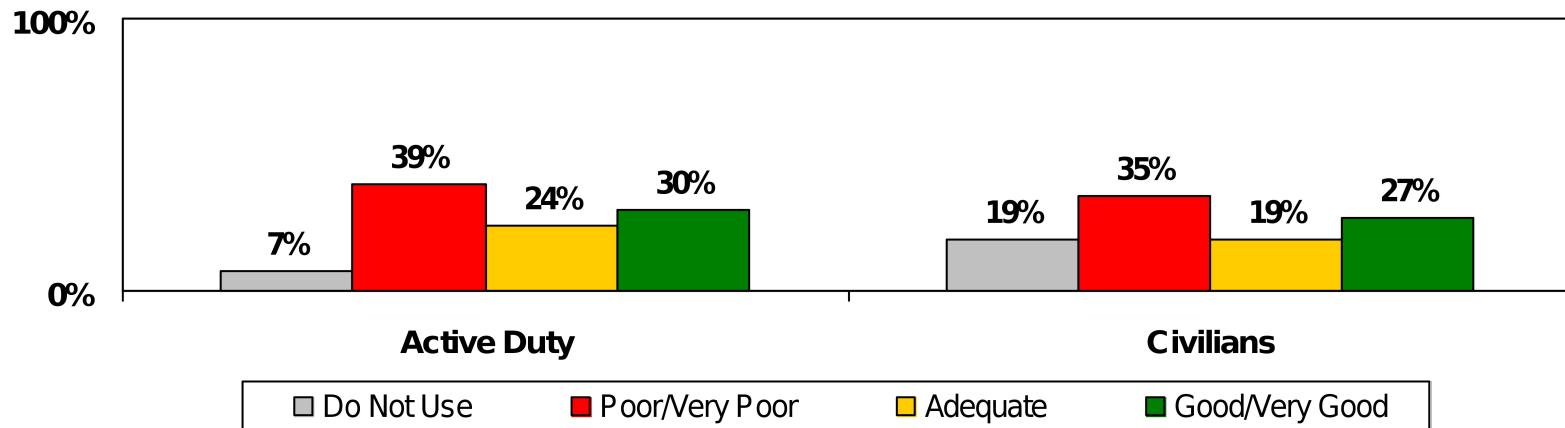
Quality of Off-Post Services



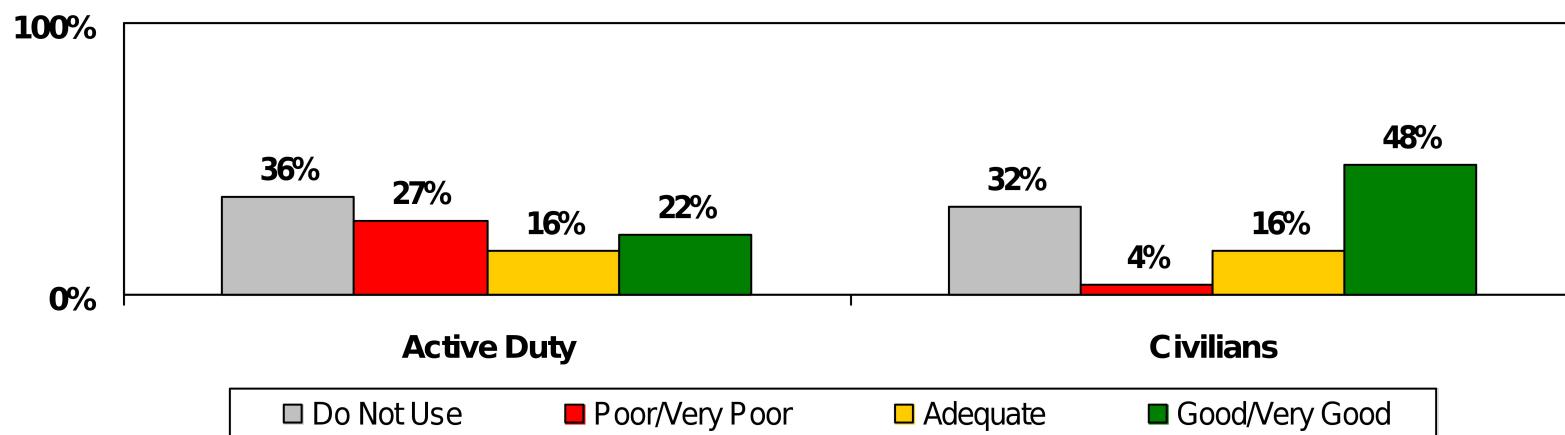
MWR PROGRAMS & FACILITIES: ENTERTAINMENT SERVICES QUALITY

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Quality of On-Post Services

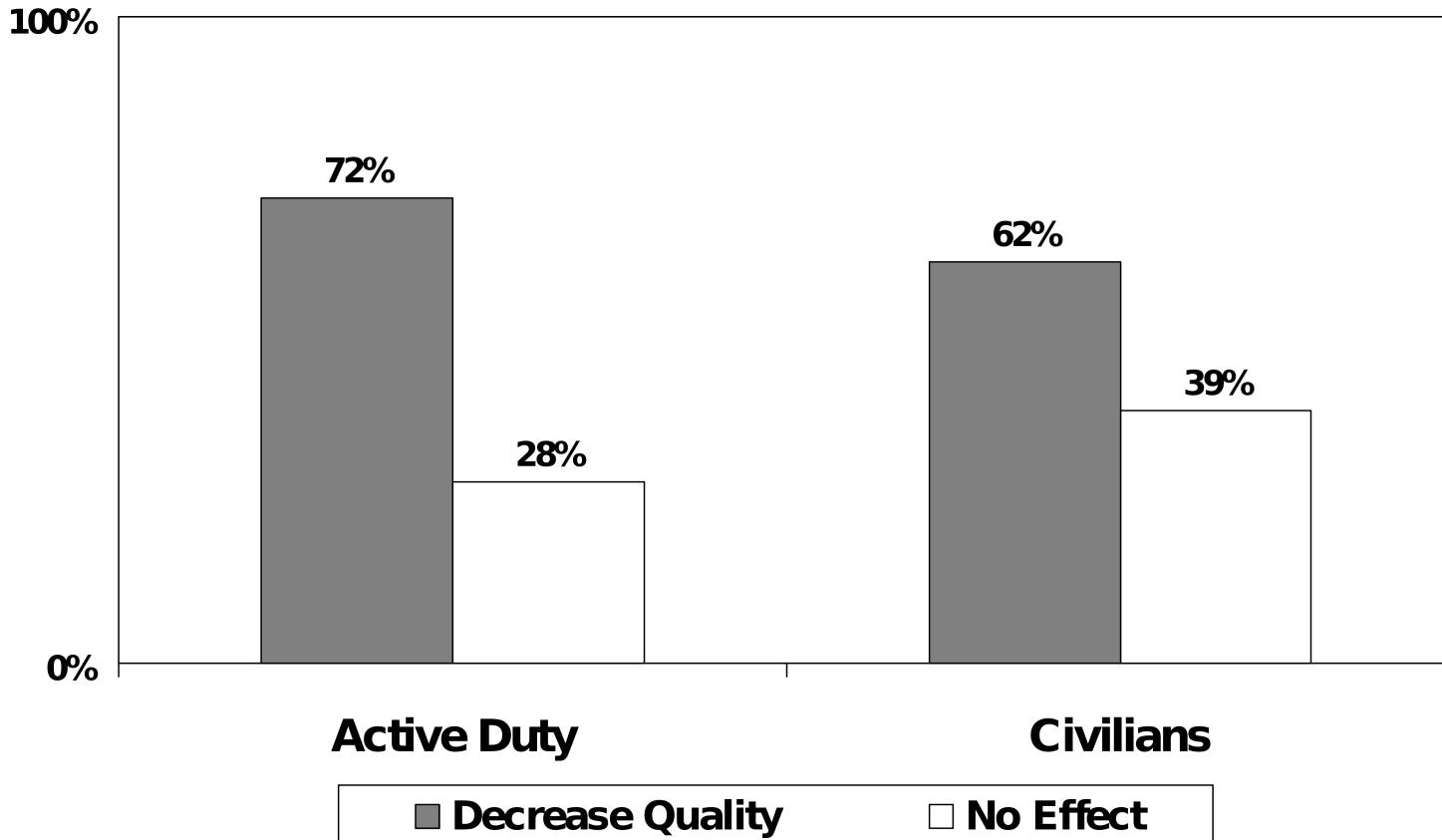


Quality of Off-Post Services



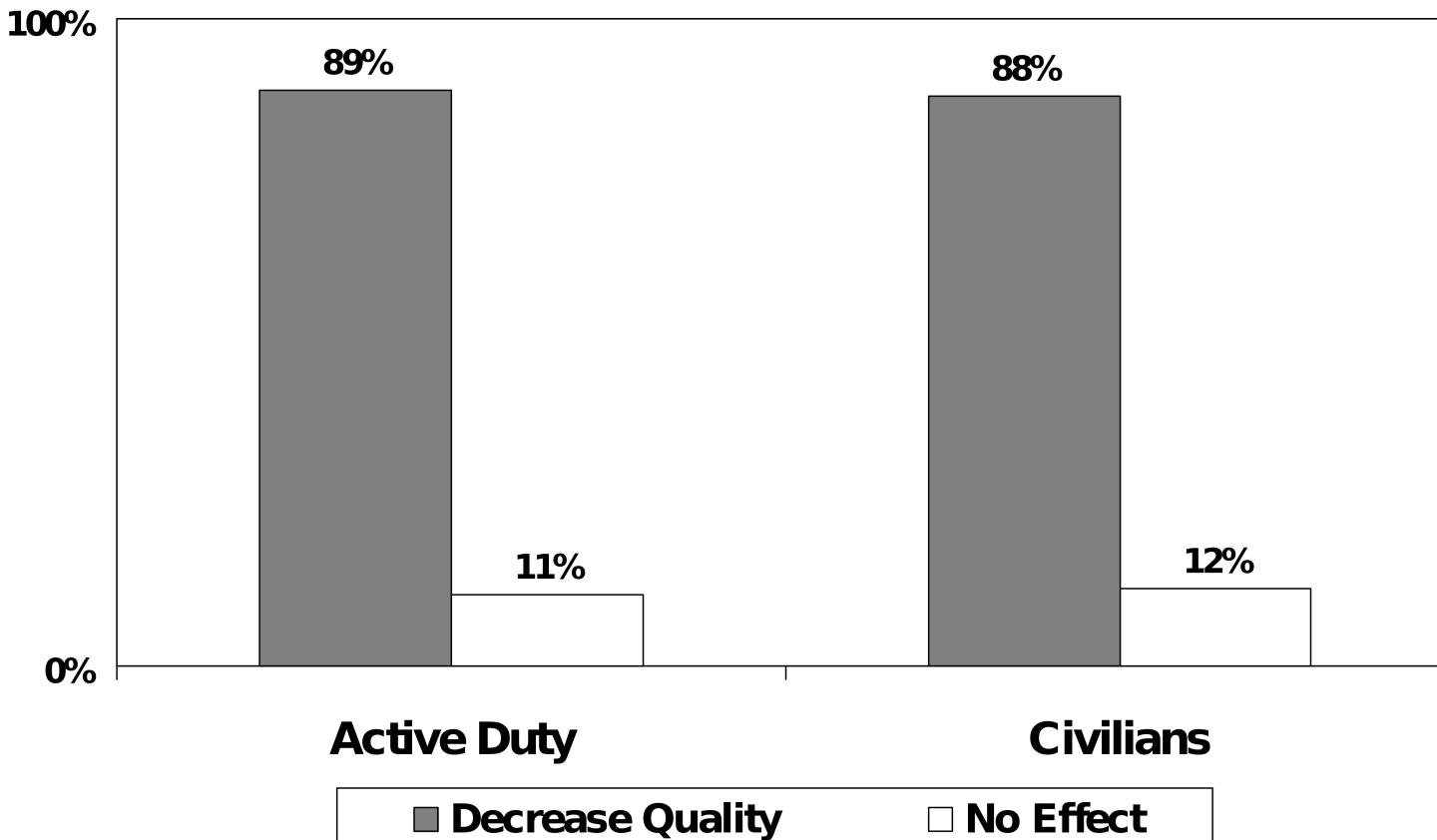
MWR PROGRAMS & FACILITIES: CLUB PROGRAM ELIMINATION EFFECT ON ARMY QOL

AST Livorno



MWR PROGRAMS & FACILITIES: RECREATION PROGRAM ELIMINATION EFFECT ON ARMY QOL

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MWR PROGRAMS & SERVICES: MOST AND LEAST IMPORTANT ACTIVITIES/PROGRAMS

AST Livorno

Top 7 Activities/Programs

Fitness Center/Gymnasium	87%
Library	73%
Athletic Fields	57%
Army Lodging	56%
Automotive Skills	56%
Child Development Center	50%
Youth Center	50%

Respondents were asked to select the 7 most important and 7 least important activities and programs offered on an Army installation.

RV Park	80%
Golf Course Pro Shop	79%
Golf Course	72%
Golf Course Center Food & Beverage	71%
Bowling Pro Shop	62%
Arts & Crafts Center	59%
Cabins & Campgrounds	39%

Bottom 7 Activities/Programs

MWR PROGRAMS & SERVICES: SOURCES OF INFORMATION*

AST Livorno

WHERE DO YOU GET INFORMATION?	ACTIVE DUTY	CIVILIANS	TOTAL
Internet	9%	19%	13%
E-mail	28%	27%	28%
Friends and neighbors	35%	50%	41%
Family Readiness Groups (FRGs)	4%	0%	3%
Bulletin boards on post	52%	62%	56%
Post newspaper	17%	38%	26%
MWR publications	28%	69%	45%
Radio	28%	27%	28%
Television	33%	19%	27%
My child(ren) let(s) me know	4%	4%	4%
Other unit members or co-workers	33%	46%	38%
Unit or post commander or supervisor	17%	15%	17%
Marquees/billboards	35%	65%	47%
Flyers	20%	46%	30%
Other	9%	4%	7%
I never hear anything	9%	0%	5%

*The top 3 sources of MWR information are shaded for each patron group and the total population.

MWR PROGRAMS/SERVICES: GENERATE FEELING THAT THE ARMY CARES ABOUT ITS PEOPLE*

AST Livorno

MMR PROGRAM/SERVICE	ACTIVE DUTY
Army Child and Youth Services	70%
Better Opportunities for Single Soldiers	46%
Army Community Service	37%
MWR Programs and Services	70%

* Positive = moderate, great or very great extent

ARMY COMMUNITY SERVICE: AWARENESS AND BENEFIT - ACTIVE DUTY

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ACS PROGRAMS	AWARENESS	BENEFICIAL*	NOT BENEFICIAL*
Information and Referral	48%	100%	0%
Outreach programs	42%	80%	20%
Family Readiness Groups	71%	100%	0%
Relocation Readiness Program	69%	100%	0%
Family Advocacy Program	71%	91%	9%
Crisis intervention	42%	100%	0%
Money management classes, budgeting assistance	58%	100%	0%
Financial counseling, including tax assistance	63%	92%	8%
Consumer information	31%	100%	0%
Employment Readiness Program	46%	100%	0%
Foster child care	31%	100%	0%
Exceptional Family Member Program	44%	100%	0%
Army Family Team Building	35%	100%	0%
Army Family Action Plan	35%	100%	0%

* Percentage of Active Duty users

ARMY COMMUNITY SERVICE: POSITIVE IMPACTS ON ACTIVE DUTY

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POSITIVE* ACS IMPACTS	ACTIVE DUTY
Satisfaction with my job	33%
Personal job performance/readiness	36%
Unit cohesion and teamwork	35%
Unit readiness	42%
Relationship with my spouse	40%
Relationship with my children	43%
My family's adjustment to Army life	33%
Family preparedness for deployments	53%
Ability to manage my finances	31%
Feeling that I am part of the military community	46%

* Positive = moderate, great or very great extent

CHILD AND YOUTH SERVICES: POSITIVE IMPACTS ON ACTIVE DUTY

AST Livorno

POSITIVE* CYS IMPACTS	ACTIVE DUTY
Helps minimize lost duty/work time due to lack of child care/youth sponsorship options	80%
Helps minimize lost duty/work time due to lack of child care/youth services	80%
Plays a role in influencing my decision/my spouse's decision to remain in the Army	56%
Allows me to work outside my home	67%
Allows me to work at home	0%
Offers me an employment opportunity within the CYS program	0%
Allows me/my spouse to better concentrate on my/our job(s)	70%
Provides positive growth and development opportunities for my children	70%

* Positive = moderate, great or very great extent

BETTER OPPORTUNITIES FOR SINGLE SOLDIERS (BOSS):

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POSITIVE IMPACTS ON ACTIVE DUTY

POSITIVE* BOSS IMPACTS	ACTIVE DUTY
Satisfaction with my job	42%
Personal job performance/readiness	42%
Unit cohesion and teamwork	43%
Unit readiness	36%
Ability to manage my finances	50%
Feeling that I am part of the military community	46%
Relationship with my children (single parents)	60%
My family's adjustment to Army life (single parents)	60%
Family preparedness for deployments (single parents)	50%

* Positive = moderate, great or very great extent

LEISURE ACTIVITIES: PREFERENCES OVERALL AND BY PATRON GROUP

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Top 10 Leisure Activities for All Respondents

Internet access/applications (home)	72%
Reading	72%
Watching TV, videotapes, and DVDs	70%
Internet access (library)	69%
Entertaining guests at home	67%
Multi-media (videos, DVDs, CDs)	63%
Study/self development	54%
Automotive maintenance & repair	53%
Digital photography	52%
Going to beaches/lakes	52%

Top 5 for Active Duty

Internet access/applications (home)	73%
Internet access (library)	71%
Watching TV, videotapes, and DVDs	65%
Entertaining guests at home	63%
Reading	63%

Top 5 for Civilians

Reading	83%
Watching TV, videotapes, and DVDs	80%
Entertaining guests at home	74%
Internet access/applications (home)	71%
Internet access (library)	67%

LEISURE ACTIVITIES: PREFERENCES BY ACTIVITY CATEGORY

AST Livorno

Team Sports	
Basketball	32%
Softball	30%
Volleyball	19%
Self-directed sports tournaments	15%
Touch/flag football	14%

Sports and Fitness	
Walking	40%
Cardiovascular equipment	37%
Weight/strength training	31%
Running/jogging	21%
Bowling	21%

Outdoor Recreation	
Going to beaches/lakes	52%
Bicycle riding/mountain biking	26%
Snow skiing/snowboarding	23%
Camping/hiking/backpacking	20%
Picnicking	14%

Entertainment	
Watching TV, videotapes, and DVDs	70%
Festivals/events	44%
Going to movie theaters	40%
Plays/shows/concerts	25%
Card/table games	23%

Social	
Entertaining guests at home	67%
Night clubs/lounges	39%
Happy hour/social hour	34%
Dancing	31%
Specially arranged shopping trips	26%

Special Interests	
Internet access/applications (home)	72%
Automotive maintenance & repair	53%
Digital photography	52%
Automotive detailing/washing	47%
Trips/touring	46%

LEISURE ACTIVITIES: MARKET SHARE OF ACTIVITY PREFERENCES ON POST*

AST Livorno

ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	OVERALL PARTICIPATION
Reading	72%	N/A	72%
Internet access (library)	69%	N/A	69%
Multi-media (videos, DVDs, CDs)	63%	N/A	63%
Study/self development	54%	N/A	54%
Reference/research services	50%	N/A	50%
Automotive maintenance & repair	38%	8%	53%
Going to movie theaters	35%	4%	40%

*Top 7 leisure activity preferences ranked by on-post participation.

LEISURE ACTIVITIES: MARKET SHARE OF SPECIAL INTEREST ACTIVITY PREFERENCES BY LOCATION*

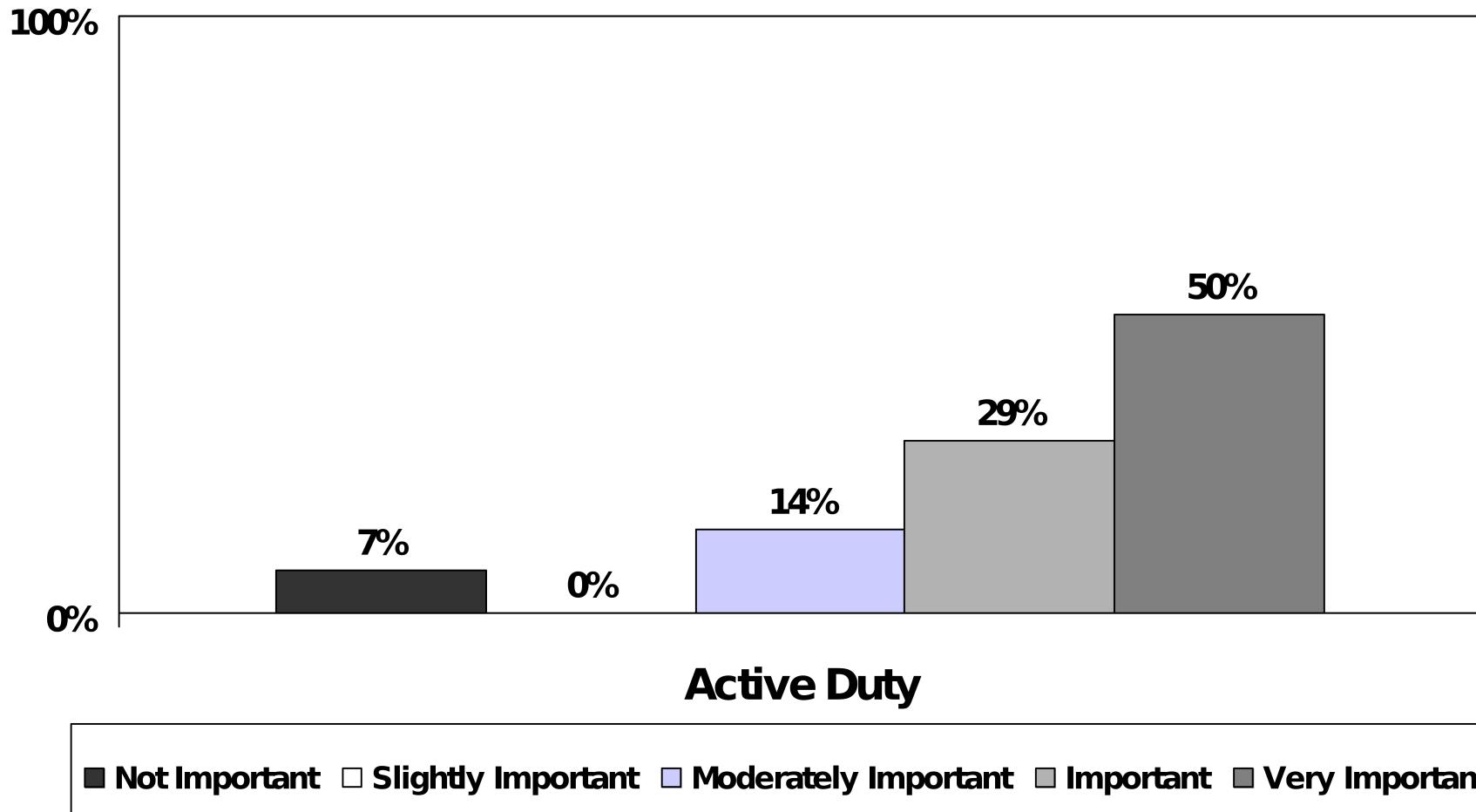
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ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	PARTICIPATED PRIMARILY AT HOME	OVERALL PARTICIPATION
Internet access/applications (home)	23%	8%	42%	72%
Automotive maintenance & repair	38%	8%	8%	53%
Digital photography	5%	24%	23%	52%
Automotive detailing/washing	32%	6%	9%	47%
Trips/touring	13%	33%	0%	46%
Computer games	3%	4%	25%	32%
Gardening	0%	1%	26%	27%

*Top 7 special interest activity preferences ranked by overall participation.

DEPLOYMENT AND MWR: IMPORTANCE OF ACCESS TO MWR DURING DEPLOYMENT

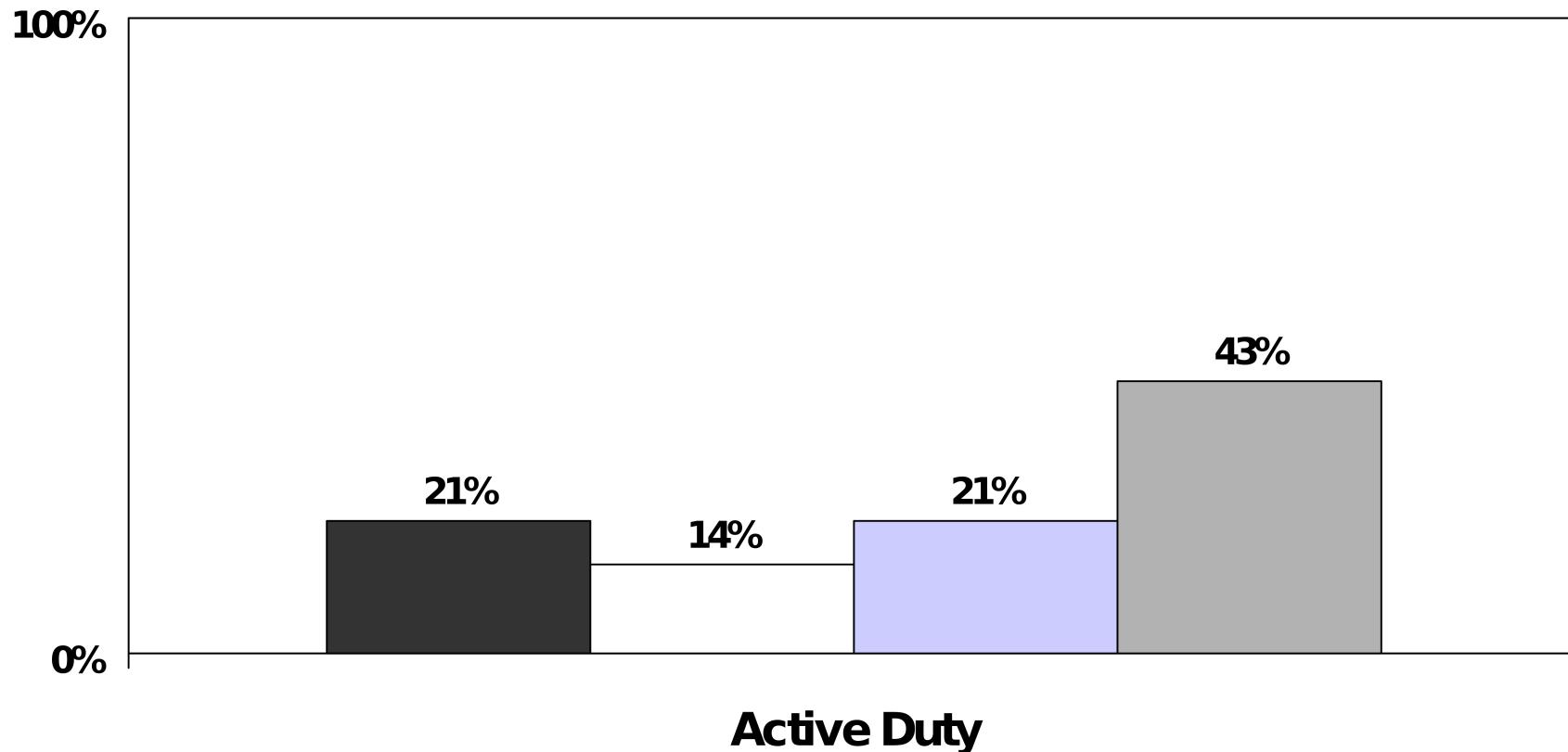
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DEPLOYMENT AND MWR: USE OF MWR DURING DEPLOYMENT IN THEATER OR AT HOME

INSTALLATION

AST Livorno



■ Did Not Use □ Less Than Once Per Month □ 1-3 Times Per Month □ 4 or More Times Per Month

CAREER INTENTIONS: ACTIVE DUTY

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Current Plans About Making the Military Your Career	ACTIVE DUTY
Definitely will not make military a career	16%
Probably will not make military a career	7%
Undecided	30%
Probably will make military a career	14%
Definitely will make military a career	34%

NEXT STEPS

AST Livorno

□ **INSTALLATION REPORTS**

- Review information on 91 leisure activities and up to 40 MWR facilities
- Share with Commander and program managers

□ **DATA APPLICATIONS**

- Action planning for program change and enhancement
- Strategic business planning
- Five year program planning
- Priorities for Project Validation Assessments
- Follow-up focus groups on items of interest or for clarification of findings
- Input into the Installation Status Report (ISR)